



Lead Paint Enforcement SharePoint Project

US ENVIRONMENTAL PROTECTION AGENCY

REGION 7

WATER, WETLANDS, AND PESTICIDES DIVISION

Who We Are

- ▶ EPA Region 7
Water, Wetlands and Pesticides Division
Toxics and Pesticides Branch
- ▶ Responsible for implementing and enforcing Lead-Based Paint rules and regulations
- ▶ **Our team:** Jamie Green, Maria Morey, Kelley Catlin, Michael Propst, and Chrislyn Means

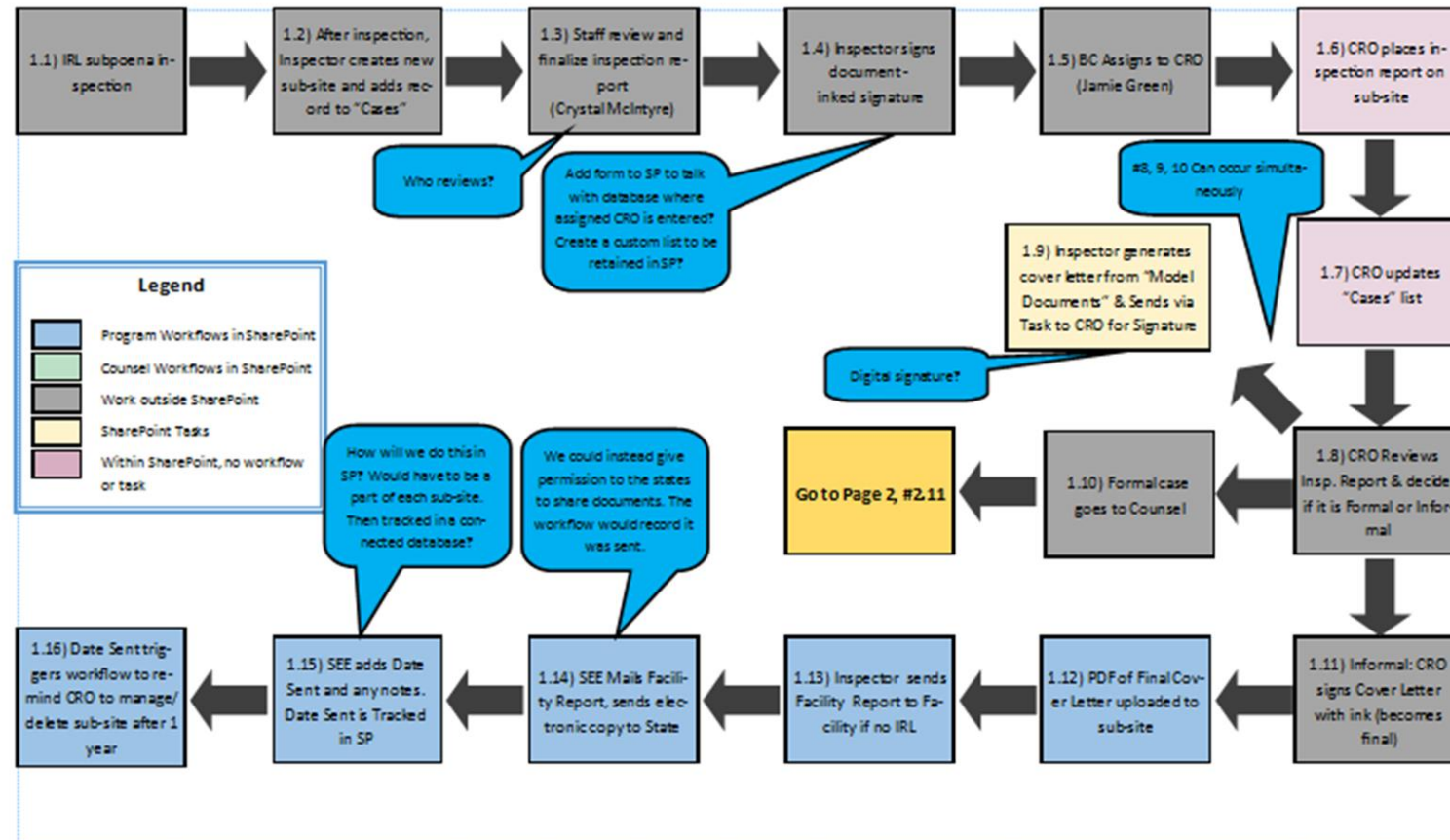


What's our problem?

- ▶ 80+ inspections per year
- ▶ Route paper copies of documents by hand or email copies for review and processing
- ▶ Began working on a solution in May 2015



First Step – Map Our Current Process



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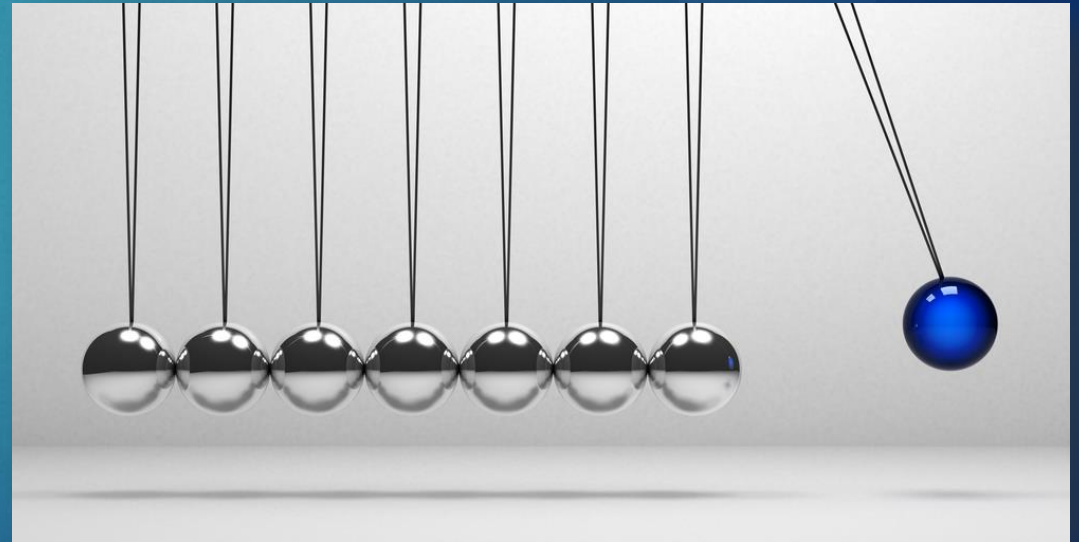
A Solution!

- ▶ SharePoint site to automate the concurrence process
- ▶ SharePoint
 - ▶ Microsoft Office product
 - ▶ Create websites
 - ▶ Secure place to store, organize, share, and access information from almost any device



Impact

- ▶ “One stop” electronic shop for all case related material
 - ▶ Inspection
 - ▶ Enforcement documents
 - ▶ Policy documents
 - ▶ Templates
- ▶ Accessible to program staff, regional counsel, and management
- ▶ **Easily modified to fit other enforcement programs**
 - ▶ Media specific
 - ▶ Cross Regional
 - ▶ Agencies



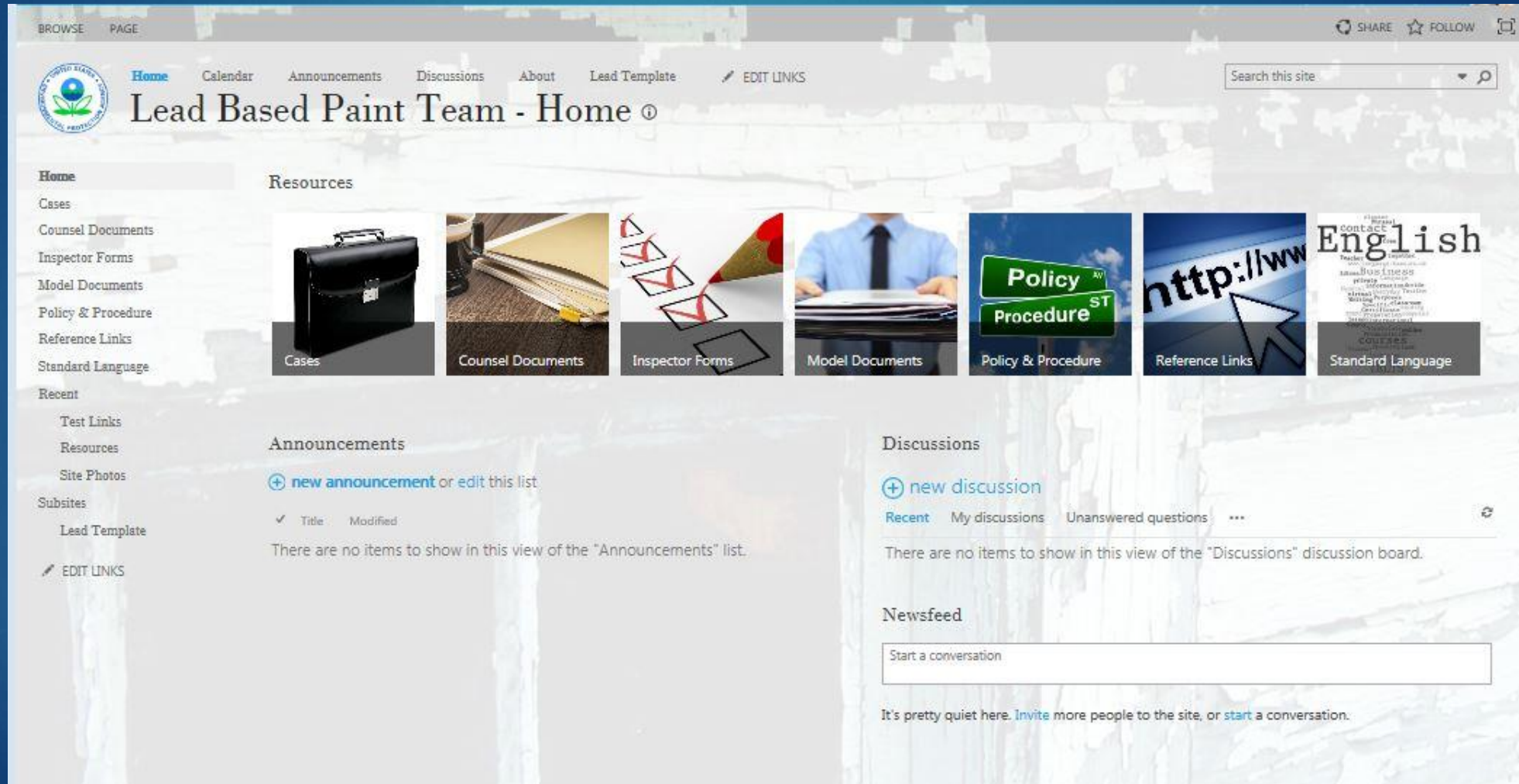
Anticipated Results

- ▶ More efficient
 - ▶ All electronic records in one location
 - ▶ Collaboration and review of case documents
- ▶ Easy to access all inspections and case documents
 - ▶ Case Review Officer, Inspector, Attorney, and management team
- ▶ Less paper routing
- ▶ Telework accessible



SharePoint Solution

- Structure: tree structure with parent site containing sub-sites for each case
- Benefits: automated process with task driven workflows
- Reporting: allows the roll-up of data and provides overview reporting for management



Enforcement sub-site structure

- Created as a site template
- Complete solution with built in workflows

The screenshot displays the 'Lead Template' SharePoint site. The top navigation bar includes 'Home', 'Calendar', 'Announcements', 'Discussions', 'About', and 'Lead Template'. A search bar is located on the right. The left sidebar contains a navigation menu with 'Home', 'Notebook', 'Tasks', 'Draft Inspection Report', 'Inspection File Documents', 'Case Documents', 'Case Images', 'Case Contacts', 'Calendar', 'Recent', 'Case Roles', 'Access-Groups', 'Site Contents', and 'EDIT LINKS'. The main content area is divided into several sections:

- Project Summary:** Shows 'Complete' and '1 upcoming' items. The upcoming item is 'Enforcement Case: Case Review Officer...' due 8/3/2016 by Propst, Michael.
- Case Roles:** A table listing roles and staff members.
- Draft Inspection Report:** A list of draft reports, including 'ABC-Enforcement'.
- Inspection File Documents:** A list of inspection file documents, including 'ABC-Enforcement-Final'.

Case Roles Table:

Title	Staff	Role
Initial Review	Propst, Michael	Reviewer
Case Review Office		Case Review Officer
Attorney		Attorney
Council Management		Council Manager
Program Management	Propst, Michael	Program Manager
Inspector	Propst, Michael	Inspector
SEE		SEE

Draft Inspection Report Table:

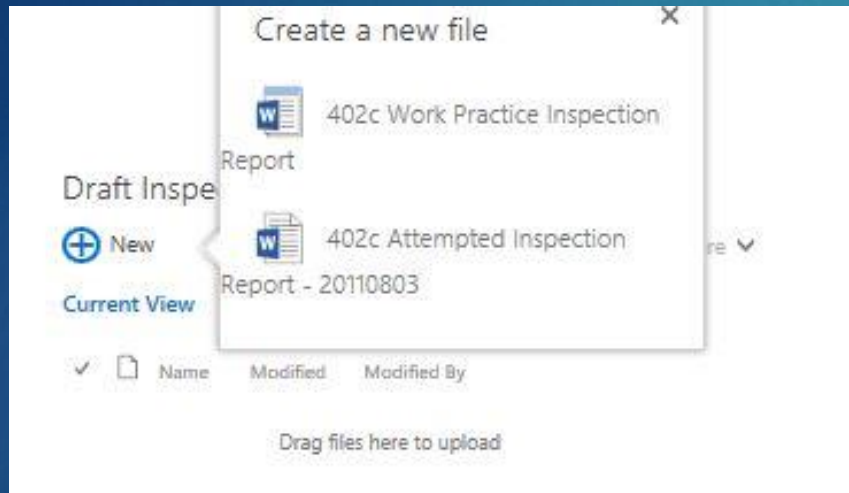
Name	Modified	Modified By
ABC-Enforcement	24 minutes ago	Propst, Michael

Inspection File Documents Table:

Name	Modified	Modified By
ABC-Enforcement-Final	4 minutes ago	Propst, Michael

Case Process

- Task driven workflows based off of document libraries and custom lists
- Enforcement document templates used in libraries



Word Online Lead Template

Docume... - Saved Share Propst, M

FILE HOME INSERT PAGE LAYOUT REVIEW VIEW DESIGN LAYOUT

Tell me what you want to do EDIT IN WORD

Times New Roman 9 A* A*

B I U abc x₂ x² a/v A

Undo Clipboard Font Paragraph Styles Editing

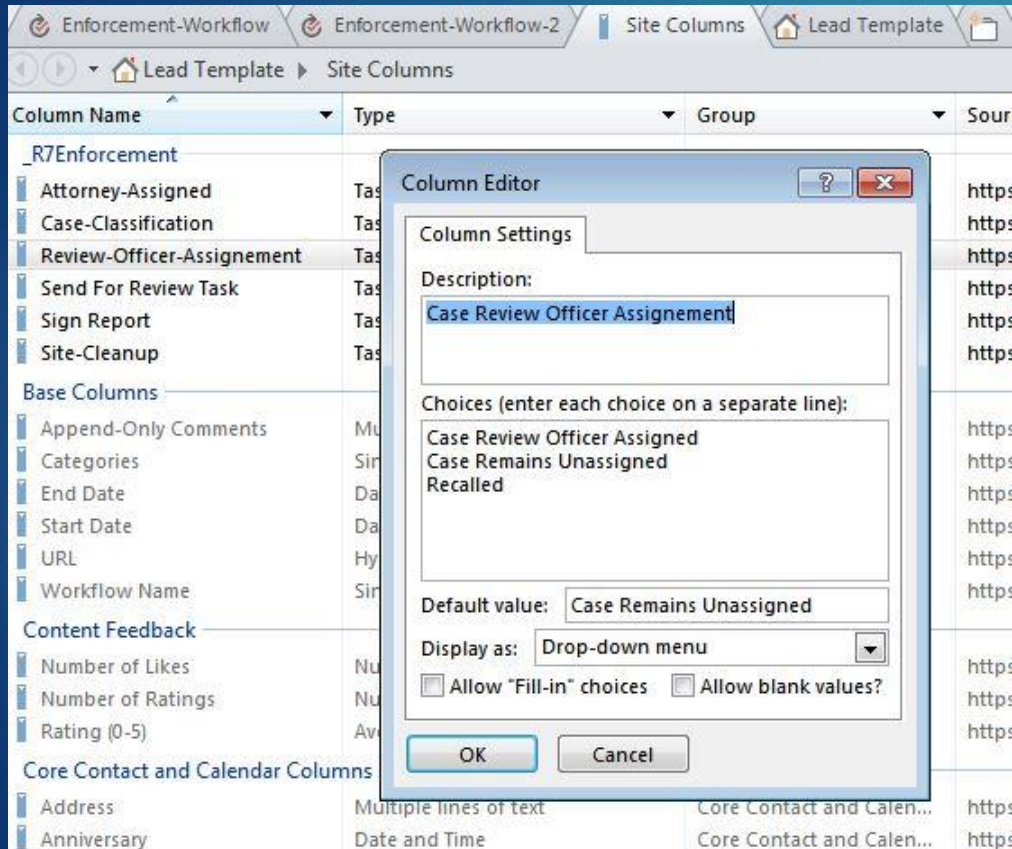
AaBbCc Normal AaBbCc No Spacing AaBbCc Heading 1 AaBbCc Heading 2

INSPECTION INFORMATION				
1.	Date of Inspection:		2.	Inspector:
3.	Inspection Number:			
4.	Name of Renovation Firm			
5.	Type of Firm:	General Building Contractor/Residential Remodelers (Renovation Firm, Individual Contractor, etc.) Special Trade Contractor (Carpenter, Painter, Drywall worker/lather, "Home Improvement" Contractor, etc.) Property Management Firm Landlord		
6.	Location of Inspection:	Description/Name: <input type="text"/> Street Address: <input type="text"/> City: <input type="text"/> State: <input type="text"/> Zip: <input type="text"/>		
7.	Mailing Address of Firm:	Point of Contact: <input type="text"/> Telephone Number: <input type="text"/> Email: <input type="text"/> Street Address: <input type="text"/> City: <input type="text"/> State: <input type="text"/> Zip: <input type="text"/>		
8.	Inspection was	unannounced or scheduled in advance		
	If scheduled, when and how?	by phone or in person on by letter on		
Person(s) interviewed during inspection:				

PAGE 1 OF 12 ABOUT 4518 WORDS ENGLISH (U.S.) 100% HELP IMPROVE

Task Driven Custom 2013 Workflow Process

- Custom Site Columns
- Content Type Creation
- Task Tracking

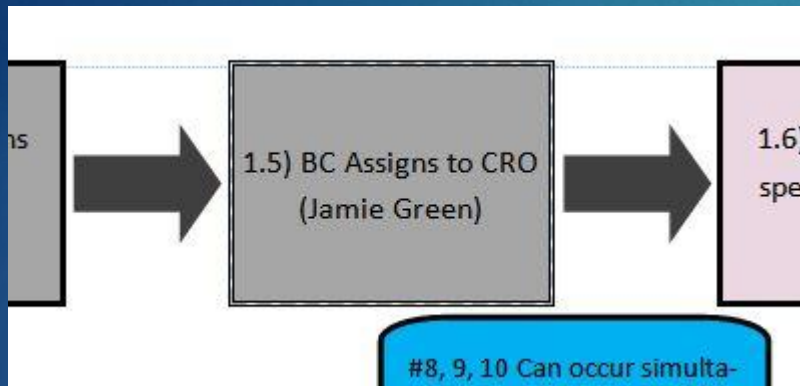


The screenshot shows the 'Case Review Officer Assignment' content type configuration page. It displays a table of columns with their types and properties.

Column Name	Type	Property
Task Name	Single line of text	Required
Start Date	Date and Time	Optional
Due Date	Date and Time	Optional
Assigned To	Person or Group	Optional
% Complete	Number (1, 1.0, 100)	Optional
Body	Multiple lines of text	Optional
Predecessors	Lookup (information already on ...	Optional
Priority	Choice (menu to choose from)	Optional
Task Status	Choice (menu to choose from)	Optional
Related Items	Related Items	Optional
Instance Id	Single line of text	Hidden
Review-Officer-Assignment	Task Outcome	Required

Workflow Creation

- Business processes converted to SharePoint Workflow Stages
- Stage progression driven by task completion



Stage: Case Review Officer (CRO) Assignment

Log Case Review Officer Assignment Stage ... to the workflow history list

then Add 0 months, 7 days, 0 hours, 0 minutes to Today (Output to Variable: CROAssignDate)

Step: Case Review Officer Task Process

Log Case Review Officer Task Assignment S... to the workflow history list

then Assign a task to Case Roles:Staff (Task outcome to Variable: CRO-Assign-Task | Task ID to Variable: TaskID)

Loop: CRO Task Loop

The contents of this loop will run repeatedly while: Variable: CRO-Assign-Task not equals Case Review Officer Assigned

Log Case Review Officer Assignment Task ... to the workflow history list

then Assign a task to Case Roles:Staff (Task outcome to Variable: CRO-Assign-Task | Task ID to Variable: TaskID)

then Set Variable: CROValue to Case Roles:Staff

If Variable: CROValue is empty

Step: Case Review Officer Case Role Assignment

Assign a task to Case Roles:Staff (Task outcome to Variable: CRO-Assign-Task | Task ID to Variable: TaskID)

Loop: Case Role CRO Loop

The contents of this loop will run repeatedly while: Variable: CRO-Assign-Task not equals Case Review Officer Assigned

Log Case Review Officer Assignment Task ... to the workflow history list

then Assign a task to Case Roles:Staff (Task outcome to Variable: CRO-Assign-Task | Task ID to Variable: TaskID)

Task Control

- Task assigned through email
- Due dates calculated automatically
- Overdue notices sent
- Task list overview



Wed 7/27/2016 7:58 AM

Lead Template <no-reply@sharepointonline.com>

Task Assigned - Enforcement Case: Case Review Officer Assignment

To Propst, Michael

Retention Policy Inbox (Never)

Expires: Never

You have a new task.

Enforcement Case: Case Review Officer Assignment

ASSIGNED TO Propst, Michael

DUE DATE 8/3/2016 12:00:00 AM

DESCRIPTION In assigning a Case Review Officer ensure their name is entered into the Case Roles List to ensure proper notification

RELATED ITEM [ABC-Enforcement-Final](#)

Tasks



new task or edit this list

All Tasks

Calendar

Completed

...

Find an item



✓		Title	Due Date	Assigned To
	<input checked="" type="checkbox"/>	Complete Initial Draft Inspection Report Document	... August 3	Propst, Michael
	<input checked="" type="checkbox"/>	A Draft Inspection Report has been submitted for initial review	... August 3	Propst, Michael
	<input type="checkbox"/>	Inspection Report Signature	...	Propst, Michael
	<input type="checkbox"/>	Enforcement Case: Case Review Officer Assignment	... August 3	Propst, Michael

Summary

- ▶ Accessible to program staff, regional counsel, and management
- ▶ More efficient
 - ▶ All electronic records in one location
 - ▶ Collaboration and review of case documents
- ▶ Easily modified to fit other enforcement programs
 - ▶ Media specific
 - ▶ Cross Regional
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Questions?



- ▶ Special thanks for input and assistance: Jeffery Robichaud; Diann Sandridge, Erin Weekley, Denise Dantzler